

**From:** [NonprofitWebAdvisor](#)  
**To:** [Kent Smith](#)  
**Subject:** Safeguarding Your Nonprofit: Documenting Meetings, Taking Minutes, and Maintaining Records  
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NonprofitWebAdvisor



## Safeguarding Your Nonprofit: Documenting Meetings, Taking Effective Minutes, and Maintaining Necessary Records

**Step-by-step guidance through holding effective meetings, documenting actions  
taken by the board, and maintaining records to safeguard your nonprofit.**

Every nonprofit should be keeping accurate, up-to-date, and comprehensive records. In the event of an audit, investigation, or legal action this is the only way to demonstrate that your board, executive director, and employees are all operating within the limits of the law. Many nonprofits, however, don't understand the importance of documenting their meetings and decisions in writing. Board meetings, committee activities, and management reports are all critical to the nonprofit's ability to demonstrate their decision making process, adherence to board policies and bylaws, and to meeting state and federal requirements. With increased IRS, attorneys general, and general public scrutiny, demonstrating compliance has never been more important.

Can you answer these questions?

- How do you design and manage the meeting and documentation process?
- What is important to do -- or not do?
- How do you impress upon your board members the necessity for a legal paper trail to protect your board, your nonprofit and your clients?
- What is the best way to demonstrate that your all-volunteer board is fulfilling their fiduciary duties -- as well as the duties of care and loyalty?

Please join Lynn Ivey, nonprofit consultant, as she explores key strategies and steps to take to hold effective meetings, document actions taken by the board, and maintain records to safeguard your nonprofit.

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<b>Date:</b>	August 20, 2015, 1 PM Eastern.
<b>Duration:</b>	Scheduled for 90 minutes including question and answer session.
	• \$299.00 webinar

<b>Price:</b>	<ul style="list-style-type: none"> <li>• \$349.00 CD (Includes full audio presentation, Q&amp;A session and presentation slides)</li> <li>• \$399.00 webinar + CD</li> <li>* <i>Each option may be viewed by an <b>unlimited</b> number of attendees from the same connection.</i></li> </ul>
<b>Presenter:</b>	Lynn Ivey, Nonprofit Consultant.
<b>Who Should Attend?</b>	CEOs, executive directors, board members, volunteer managers, HR managers, program managers, supervisors, department heads, outreach & education managers.

## WHAT YOU'LL LEARN

Just a sampling of what this webinar will cover:

- Understand what records are important and how to organize them.
- Discuss ways to design effective and productive meetings.
- Review steps for before, during and after your meetings.
- Consider best practices for taking minutes and recording decisions.
- Understand how to document special meetings.
- Identify ways to take action by "written consent."
- Find ways to get help for special circumstances.
- Review a sample of state variances of key requirements.
- Review practical tips, sample forms and special tools.
- AND MUCH MORE!

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## YOUR CONFERENCE LEADER

Your conference leader for **Safeguarding Your Nonprofit: Documenting Meetings, Taking Effective Minutes, and Maintaining Necessary Records** is Lynn Ivey. Ms. Ivey is a consultant to nonprofit organizations. Her nonprofit experience spans more than 20 years and includes prior nonprofit positions with healthcare, education, and family support/intervention programs. Her roles have been diverse including that of the administrator of one of South Carolina's largest nonprofit hospice programs. In addition she has held a variety of other nonprofit positions including: director and coordinator of volunteer programs, personnel manager, social worker, and preschool director. Ms. Ivey holds licenses as a social worker and long-term care administrator. Because of her wealth of first-hand experience both in senior nonprofit executive and volunteer positions, Ms. Ivey is a sought-after speaker and has presented at many South Carolina state conferences and regional meetings. Ms. Ivey has also served as a clinical instructor and staff trainer. Ms. Ivey also has a wealth of experience as a volunteer. Her volunteer experiences include: women's shelters, a theater company, U.S. Navy Family Service Center, and scouting. Most recently she has held volunteer positions serving on the National Council of Hospice and Palliative Professionals CEO Steering Committee, South Carolina Department of Health and Environmental Control Cancer Control Advisory Committee, South Carolina Association of Residential Care Homes Board of Directors, to mention only a few.

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